

Conferences Module Training Outline

| Section | Page | Recommended Webinar |
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| <p>New Innovations offers you an interface to manage conferences and didactic events for your program. Using the Manage Conferences page, you can create new conferences, manage existing conferences, take attendance and distribute conference surveys. This module allows you to set attendance requirements and generate attendance reports incorporating those standards.</p> | | |
| <p>Setting Conference Details:</p> <ul style="list-style-type: none"> • Configuration and default settings • Default Location • Defaults for Conference Attendance • Conferences and Work Hours • Auto Login • Content Categories • Sub-content Categories • Rooms • Objectives • Speakers • Attachments • Survey Forms • Rating Scales | <p>Pages 4 -7</p> <p>Conferences>Set up>Conference Details</p> <p>Walk through how the Program can set up their categories, etc. before building the conference series to make building the conferences easier.</p> | <p>For more information about conference set up go to Help>Tutorial Videos>Conferences-[11.1] Conferences-Setup</p> |
| <p>Setting Attendance Requirements for Conferences:</p> | <p>Pages 7-8</p> <p>Walk through the 3 ways of setting up conference attendance requirements</p> | <p>For more information about conference set up go to Help>Tutorial Videos>Conferences-[11.1] Conferences-Setup</p> |
| <p>Creating a New Conference or Conference Series:</p> <ul style="list-style-type: none"> • Speaker Tab • Attachment Tab • Links Tab • Attendee Notification Tab • Competencies and Objectives Tab | <p>Pages 9-13</p> <p>Walk through setting up a new stand-alone and recurring conference and walk through the different tabs.</p> | <p>For more information about conference set up go to Help>Tutorial Videos>Conferences-[11.2] Create a Conference</p> |
| <p>Creating Virtual Conferences with Self Check in</p> | <p>Pages 13-17</p> <p>Show the coordinator how they can create a virtual conference with self-check-in so they trainee can be virtual.</p> | |
| <p>Viewing a Conference Roster and taking attendance:</p> <ul style="list-style-type: none"> • Adding People to the roster • Removing People from the roster • Edit the roster configurations • Taking attendance in the software • Take attendance using a QR code • Drop ins | <p>Pages 17-23</p> <p>Walk through the ways to add/remove people from the conference roster and how to edit the configuration as well as taking attendance.</p> | |
| <p>Creating and distributing Conference Surveys:</p> <ul style="list-style-type: none"> • Creating a conference survey form • Adding a survey to a conferences • Distributing a survey • Completing surveys | <p>Page 23-26</p> | <p>For more information about conference set up go to Help>Tutorial Videos-Conferences-[11.6] Conferences-Surveys</p> |

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| <p>Managing Conferences</p> <ul style="list-style-type: none"> • Add • Edit • Delete • Copy • Roster • Attendance • Search | <p>Pages 26-32</p> <p>Walk through the various options for managing conferences</p> | <p>For more information about conference set up go to Help>Tutorial Videos>Conferences>[11.3] Taking Attendance & Manage conferences</p> |
| <p>Conference Calendars</p> <ul style="list-style-type: none"> • Viewing conferences Calendar • Printer friendly view • Creating Custom Views | <p>Pages 33-35</p> <p>Demonstrate how to view the conference calendar and to create custom views</p> <p>Show how to see if there is an attachment and how to download it.</p> | <p>For more information about conference set up go to Help>Tutorial Videos>Conferences- [11.4] Conferences-Create Custom Views</p> |
| <p>Copying /Editing Conferences</p> <ul style="list-style-type: none"> • Editing a recurring series • Taking Conference Attendance • Copy attendance records • Deleting a conference with recorded attendance | <p>Page 35-42</p> <p>Walk through the process of taking attendance and editing a conference.</p> | <p>For more information about conference set up go to Help>Tutorial Videos>Conferences>[11.3] Taking Attendance & Manage conferences</p> |
| <p>Managing Conference Surveys</p> <ul style="list-style-type: none"> • Completing Surveys • Managing competing surveys | <p>Page 42</p> <p>Demonstrate how to complete surveys and manage completed surveys</p> | |
| <p>Conference Reports</p> <ul style="list-style-type: none"> • By Person Report • By Conference Report • Core Competency Report • Core Competency Report by Person • Content Category Report • Curriculum Code Report • Speakers Report – Generated by Coordinator • Speakers Report – Generated by Speaker • Survey Results Report • Survey Compliance report • Survey Status Report | <p>Pages 42-52</p> <p>Walk through the setup of the various reports</p> | <p>For more information about conference set up go to Help>Tutorial Videos>Conferences-[11.5} Conferences-Reports</p> |